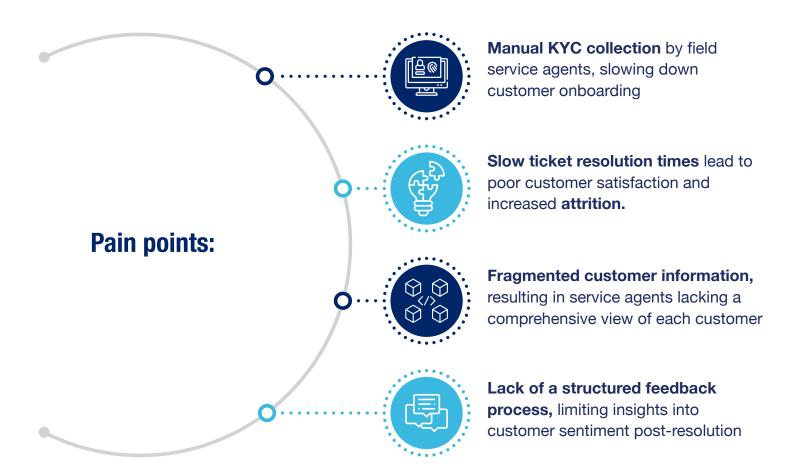


# **Overview:**

A prominent financial institution aimed to improve **customer satisfaction** by automating its **KYC process**, optimizing **case management**, and providing a **360° view of customer profiles**. By reducing manual efforts and improving feedback management, the company sought to enhance **customer retention** and offer **its clients faster**, **more effective service**.



# **Solutions:**

### **Feedback Management:**

Implemented a feedback system within Salesforce, automatically sending post-resolution surveys to customers and capturing their responses to improve service quality.

#### **KYC Automation:**

Integrated Salesforce with the mFino app, automating the document collection process and assigning KYC inquiries to the appropriate team members for a quick resolution.

### **Case Management System:**

Enabled Email-to-Case functionality in Salesforce, creating cases from customer issues and efficiently routing them to the appropriate teams for faster resolution.

### **Benefits:**



**30%** ↑ in response rates for customer issues and tickets



Enhanced customer experience through a 360° view of customer information



50% ↓ in manual KYC efforts, speeding up customer onboarding



↑ customer attrition by implementing a robust feedback management process, ensuring customer concerns were addressed effectively